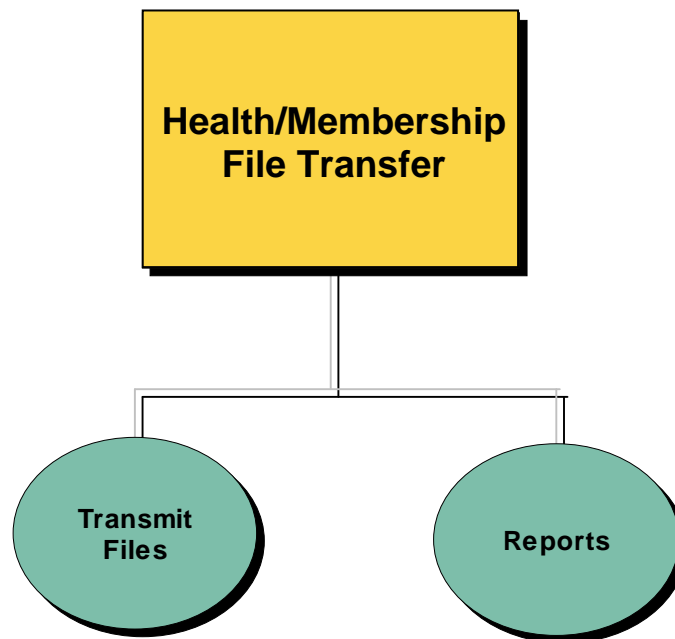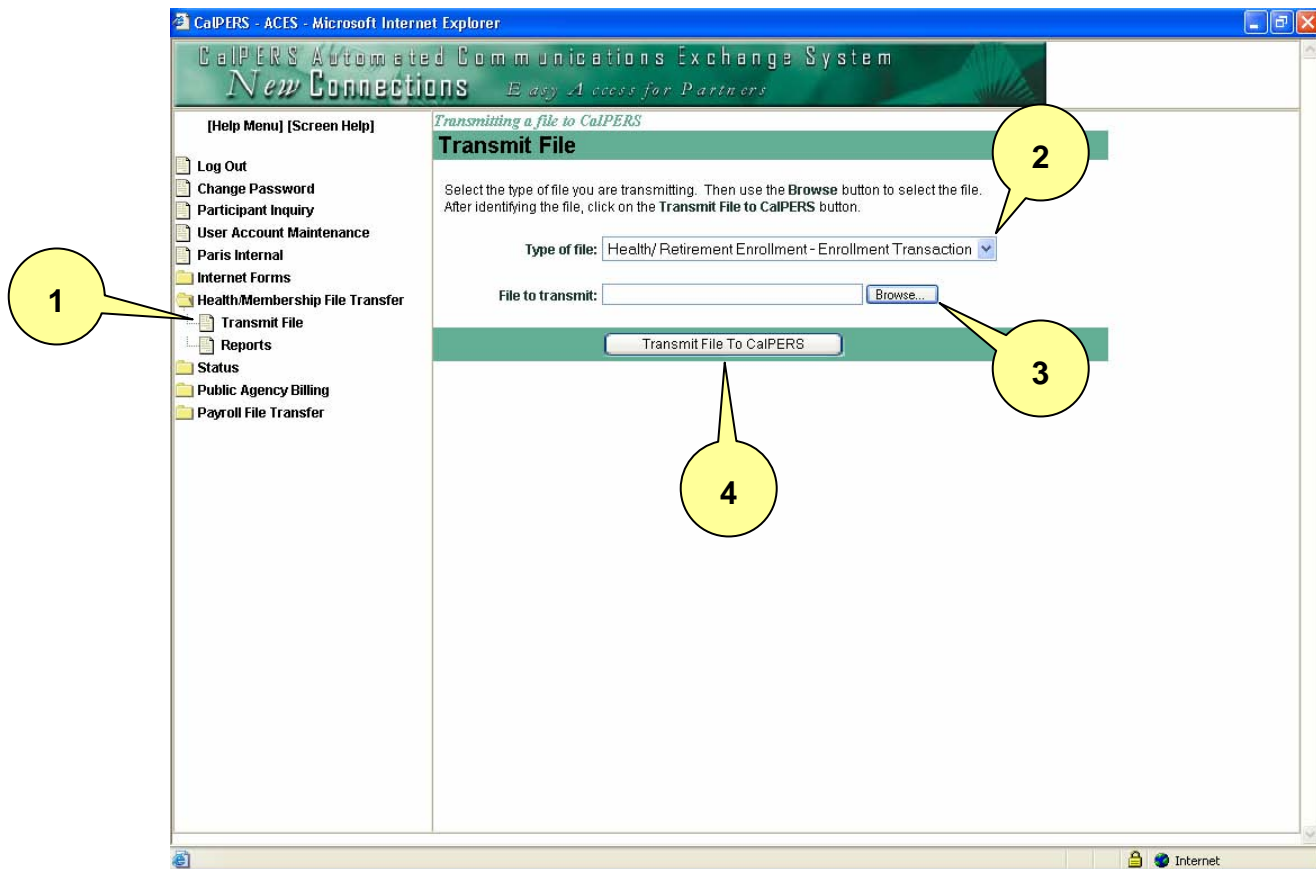## HEALTH/MEMBERSHIP FILE TRANSFER

- *Health/Membership File Transfer* allows employers to send large data files to CalPERS over the Internet for batch processing. If you currently send health or membership data via hard copy, tape, and/or diskettes, you can send the same files electronically using ACES. When the file is transmitted, ACES performs validations for size and formatting. When the file has been validated, the file transmitted will be stored for processing and a status message will appear on the *Get Status* page. If the file fails validation, ACES will not store it. However, the system will create a *Load Error* event describing the failure.

- *Health/Membership File Transfer* also allows you to request a status report from CalPERS and receive it in your file retrieval area after the batch process has been completed.

```
                  ┌─────────────────────────┐
                  │   Health/Membership     │
                  │     File Transfer       │
                  └─────────────────────────┘
                              │
                  ┌───────────┴───────────┐
            ╭─────────────╮         ╭─────────────╮
            │   Transmit  │         │   Reports   │
            │    Files    │         │             │
            ╰─────────────╯         ╰─────────────╯
```

Transmit File

1. From the *Health/Membership File Transfer* folder on the Navigation Tree, **select** *Transmit File*.

2. The Type of File box will automatically populate "Health/Membership Enrollment – Enrollment Transactions" as the file type.

3. **Click Browse** to locate the file on your local directory. From the File Upload dialog box, find the file and **click Open**. The file name appears in the File to Transmit field.

4. **Click Transmit File to CalPERS**. The system displays a status page and a tracking ID. A progress bar will indicate the status of the transmission.

Note: If the file failed ACES validation (for reasons such as file size and format), a Load Error will appear on the *Get Status* page.

Reports

The *Health/Membership File Transfer* function also allows you to request a status report for a file that you have transmitted to ACES.
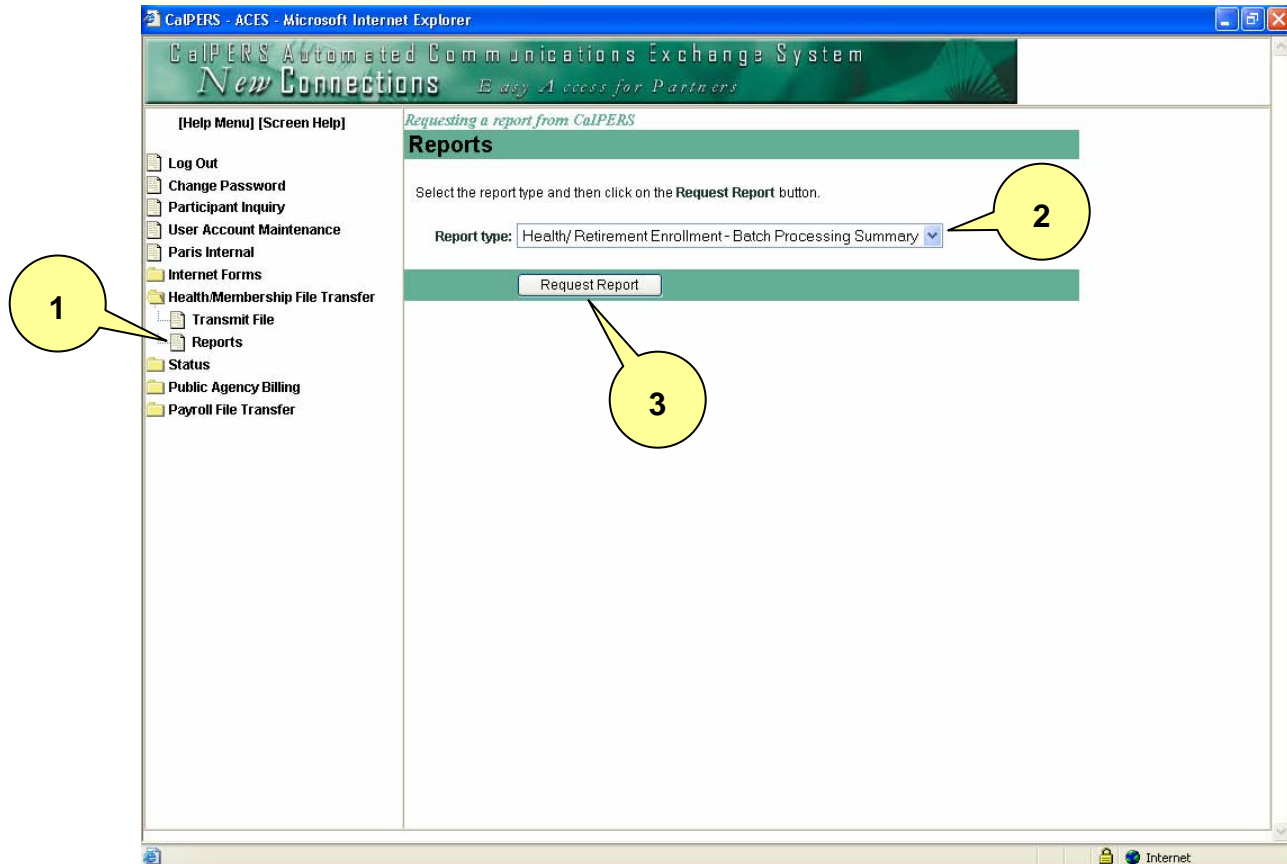
5. From the *Health/Membership File Transfer* folder on the Navigation Tree, select *Reports*.
6. **Select Report Type** from the drop-down menu.
   - Health/Retirement Enrollment – Batch Processing Summary
   - Health/Retirement Enrollment – Periodic Extract
7. **Click Request Report**. The system displays a status page and a tracking ID for the request on the *Get Status* screen.

Receiving Your Report

After your request is processed:
   - The report is sent.
   - A notification that the file was sent is logged in the *Get Status* file.
   - The report is available for pickup using *Retrieve Files*.